SiteManager
Training Manual

Module A
Chapter 3

Contract Administration (+)
Contract Management (+)
Subcontracts

Section A-3-1

Viewing Subcontracts

Student's Version

Indiana Department of Transportation
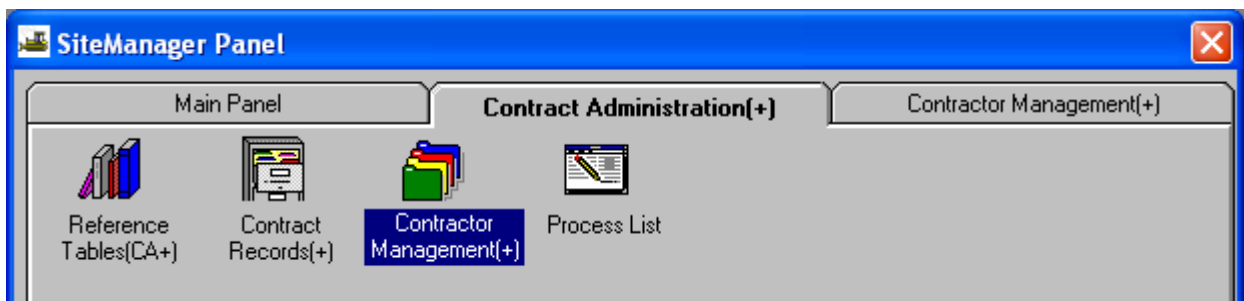October 2007, Version 3.7b

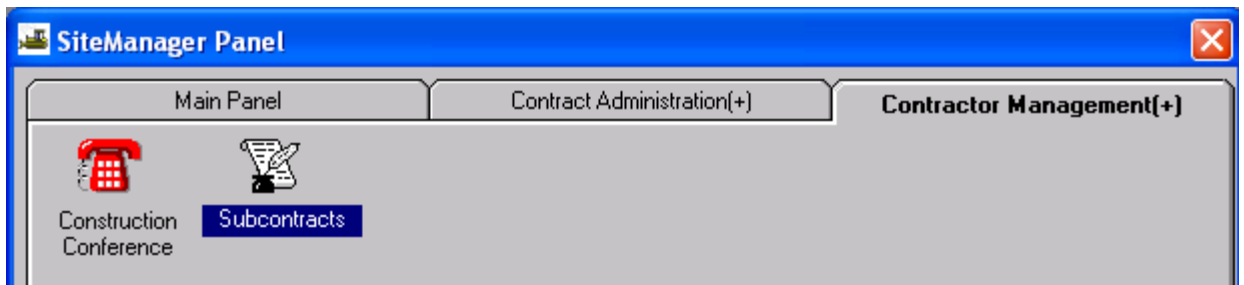This page intentionally left blank

Viewing a Subcontract

This window will allow you to view the subcontractor's information associated to a contract. This also includes the items associated to the subcontractor.

From the **Main Panel** "double click" on **Contract Administration (+)**

"Double click" on **Contractor Management (+)** icon.

"Double click" on **Subcontracts**

The **Select Contract** panel opens.

The bottom panel contains columns for:

- **Contract ID:** this is the identification number assigned to the contract.
- **Vendor ID:** this is the INDOT assigned number identifying the Prime Contractor.
- **Fed State Proj Nbr:** this is the assigned Federal or State Project Number.
- **Status:** this field indicates the current status of the contract, i.e. Pending, Active, Complete, Archived.
- **County:** this field contains a letter and number code identifying the county where the majority of the work is located.
- **Lvl 2:** this column indicates the District office administering the contract.
- **Lvl 3:** this column is not utilized by INDOT.
- **Lvl 4:** this column is not utilized by INDOT.
- **Location Description 1:** this column is the description of the physical limits of the contract.

"Double-click" on the appropriate **Contract ID**

The **Subcontract** panel opens.

"Double click" on the appropriate **Subcontractor**

The **Subcontracts** window opens.

The top panel contains non-financial information about the subcontract, including:

>**Subcontractor:** this is the name of the **Subcontractor** associated to the contract.

>**SubCont Nbr: Subcontract Number** is a unique number and is numerical starting with 1 (1,2,3,etc.).

>**Contract DBE Goal Pct:** This is the DBE goal set for the contract

Subcontract Type: This is the Type of sub contractor doing the subcontracted work.

Supp/Hauler Ind: **Supplier/Hauler Indicator** check box is for subcontractors that are only suppliers or haulers.

DBE Type: DBE Type is a code for the Subcontractor's DBE Type.

Work Type: Work Type is work that the subcontractor is pre-qualified to perform.

Cert Type: Certification Type is a System-defined code for whether the Subcontractor is certified as a DBE by the State or Federal government, or both.

Verified Payment Amt:
- **Last: Last** field is the last verified amount that has been paid to the Subcontractor. Positive or negative values may be entered.
- **Total: Total** is the total verified amount that has been paid to the Subcontractor. Must be a positive number.

Approval Date: Approval Date is the date the approval was given for this Subcontract. Must be equal to or later than the Contract award date.

Pct Twrds DBE Goal: Percentage towards DBE Goal is the percentage of the Subcontract amount counted towards the DBE commitment goal.

Fed Supp/Haul Fund Pct: Federal Supplier/Hauler Fund Percentage is the percentage of the Subcontract DBE commitment goal that is covered by federal funding for a DBE supplier or hauler.

The lower panel contains a financial summary of the subcontract.

This SubContract

    Amount: This Subcontract Amount is the Quantity multiplied by Subcontract line Item unit price for all Subcontract Items.

    Pct of Total Sub'd : Percentage of the sum of the parent Subcontract amounts covered by this Subcontract.

    Pct of Total Contract: Percentage of the Contract's current amount covered by this Subcontract's Total Amount.

This Original Commitment

    Amount: This Original Commitment Amount is the Original amount that the Prime Contractor commits to subcontract to the DBE.

    Pct of Total Sub'd: Percentage of the sum of the Subcontract original commitment amounts covered by this Subcontract.

    Pct of Total Contract: Percentage of the Contract's current amount covered by this Subcontract's Total Amount.

	Amounts	Pct of Total Sub'd	Pct of Total Contract
This SubContract:	1,332.00	100	.20
This Original Commitment :	.00	0	.00
This Current Commitment:	0.00	0	.00
Total Original Commitment:	.00		.00
Total Current Commitment:	.00		.00
Total Allowable Max (non-spclty):	329,246.68		50.00
Total Towards Max (non-spclty):	1,332.00		.20
Total Spclty Subcontracted:	.00		.00
Total Subcontracted:	1,332.00		.20

This current Commitment

Amount: This Current Commitment Amount is for Subcontracts where DBE Type is indicated.

Pct of Total Sub'd: Percentage of the sum of the Subcontract current commitment amounts covered by this Subcontract current commitment amount.

Pct of Total Contract: Percentage of the Contract's current amount covered by this Subcontract's Current Commitment Amount.

Total Original Commitment

Amount: Total Original Commitment Amount is the Sum of the original commitment amounts for all the DBE Subcontracts for a Contract.

Pct of Total Contract: Percentage of the Contract's current amount covered by the Total Original Commitment Amount.

Total Current Commitment

Amount: Total Current Commitment Amount is the sum of current commitment amounts for all the DBE Subcontracts for a Contract.

Pct of Total Contract: Percentage of the Contract's current amount covered by the Total Current Commitment Amount.

Total Allowable Max (non-speclty)

Amount: Total Allowable Max Amount is the maximum allowed amount (excluding specialty Items) for all Subcontracts in a Contract. This is the Max Allowed Subcontract Percent in the System Operational Parameter table multiplied by the difference of the total Contract amount minus the specialty Items amount.

Pct of Total Contract: Percentage of the Contract's current amount covered by the Total Allowable Max (non-specialty) Amount.

	Amounts	Pct of Total Sub'd	Pct of Total Contract
This SubContract:	1,332.00	100	.20
This Original Commitment :	.00	0	.00
This Current Commitment:	0.00	0	.00
Total Original Commitment:	.00		.00
Total Current Commitment:	.00		.00
Total Allowable Max (non-spclty):	329,246.68		50.00
Total Towards Max (non-spclty):	1,332.00		.20
Total Spclty Subcontracted:	.00		.00
Total Subcontracted:	1,332.00		.20

Total Speclty Subcontracted

> **Amount: Total Spclty Subcontracted Amount** is the sum of all specialty Item amounts for all of the Subcontracts in the Contract.
> **Pct of Total Contract:** Percentage of the Contract's current amount covered by the Total Specialty Subcontracted Amount.

Total Subcontracted

> **Amount: Total Subcontracted** is the sum of all parent Subcontract amounts for the Contract.
> **Pct of Total Contract**: Percentage of the Contract's current amount covered by the sum of all the parent Subcontract amounts.

Sub Contractor Items Tab

The items tab opens

The top panel contains:

- **Project Nbr:** the Project Number is a unique identifier associated to portion of a contract
- **Line Item:** is the Contract Line number
- **Item Code:** is the code associated to an item defining the Specification number plus a unique identifier.
- **Units Type:** is the unit of measure associated to the item. It is either English or Metric,
- **Specialty:** This identifies the item as a non-standard item requiring special specifications
- **Short Description:** This is the an abbreviated name for the item

The bottom panel contains:

- **Project Nbr:** the Project Number is a unique identifier associated to portion of a contract
- **Line Item:** is the Contract Line number
- **Supp Desc1:** Supplemental Description 1 may contain additional information for the line item
- **Supp Desc2:** Supplemental Description 2 may contain additional information for the line item

The bottom box contains:

- **Contract Bid**: Which has the original **Quantity, Unit, Price** and dollar **Amount** for the **Line Item.**
- **Current Contract:** Which has the original plus any approved Change Orders for the item.
- **Parent Subcontract:** If this item is for a second tier subcontract the values from the original subcontract are contained here.
- **This Subcontract:** Contains the quantities and values for this specific subcontract item.

"Click" on the **Close** button on the toolbar to exit.

Viewing Subcontract Information

A-3-1 Group Exercise

This exercise will demonstrate how to view subcontract data for Contract R-90004.

Login	<u>d09afaul</u>
Password	<u>pass</u>
Log in as	<u>PE/S</u>

"Double-click" on **Contract Administration (+).**
"Double-click" on **Contractor Management (+).**
"Double-click" on **Subcontracts**.
"Double-click" on **Contract ID** <u>R-90004.</u>

"Double-click" on **Subcontract Number** <u>0001 "Reflective Guardrail Co."</u>

Determine the work the subcontract covers:

        1. Line Item No.   _____

        2. Item Code   _____

"Click" the **Close** button on the toolbar to exit.